

Site Visit Programmatic Questions
Highland LifeCare Center – September 3, 2015

1. Update Report

- Review your two most recently submitted Update Reports: are you meeting Report Count goals?
- Note any significant differences between the reports: are programs stable? Improving? What do the reports indicate about progress in your programs?
Highland has had stable numbers and has in most cases exceeded the projected client numbers detailed in their recent work plan.
Medical services are down slightly especially pregnancy testing. This is appearing to be a recent trend statewide.

2. Work Plan

- Review your 2012-16 grant application's description of the program you are asking to be funded. Note the services and activities you said you would provide and the number of clients you would serve.
- Prepare a short summary of your current program(s) and the number of clients being served. How does what you describe in the application compare with what you are currently providing? Have any programs and/or activities or services been added or removed? Have the number of clients being served per quarter decreased or increased since October, 2012? Is there anything particular you want to share about your current program to explain its current status?
A summary was submitted and is located in the Highland PA file.
- Do you anticipate making any changes to the 2015-16 Work Plan? If so, in what way and for what reasons?
No.

3. Fiscal Review

- Review of the 2014-15 expenditures spreadsheet
- Have you or do you intend to revise your 2015-16 budget justification? Keep in mind that the current budget justification remains in effect until a revision is approved.
- Review the guidelines regarding expectations for invoice and verification submissions (attached), and the new requirement to submit both to financial for invoice payment. Review MDH's efforts to move to paperless invoicing.
- If your Financial Reconciliation has taken place, the findings will be reviewed.
No financial reconciliation at this time.
- If you have an elevated risk designation, and your report cited any concerns, these will be discussed. N/A

4. Grant Closeout Form

- You will have an opportunity to review a draft of your Grant Closeout Form.

5. 2014-16 Evaluation (availability of items below depend on date of site visit)

- Your 2014 Evaluation Report Summary will be discussed.

- Your 2015-16 Evaluation Plan will be discussed. Any suggestions provided in your 2013-14 Report Summary should be included in the plan, if you are continuing the same evaluation. If you are planning a new evaluation, details will be discussed. An Evaluation Plan will be submitted within the next month. Lisa was recently hired and would like the additional time to submit a thorough plan.

6. Positive Alternatives website

- The PA website is being/has been reconfigured. Its scope is reduced. Resources for grantees will remain basically the same.
- Consider providing suggestions for additions/deletions

7. Provide Updates

- Have you made any changes to your application Face Sheet data?
Yes, Changes were submitted and noted.
- Do you want to revise your website posting?
Yes, website posting changes were also submitted.

8. Issues specific to this grantee

With the upcoming transition from 2 buildings and programs (Highland and University) to one central location in St. Paul, the grantee expects the move will temporarily change the numbers of clients and services that the 2 Centers will be providing. The client accounting for both separate entities and the monitoring of invoices to ensure staff are prorated appropriately between the two Centers was also discussed. The grantee has presented a good plan for both the tracking of clients and the accounting of PA funds and invoicing. The grantee will maintain their separate 501(c) (3) status for both Highland and University that will legally enable them to operate two separate centers under one roof.

9. Tour of Facility

- If your facility has been remodeled or updated with grant funds, be prepared to provide a tour of the area
- If grant-funded activity areas have been significantly altered, be prepared to provide a tour of the area.

A tour of the new Abria Center will be scheduled sometime in October or November as a follow up to our site visit. This visit was conducted on November 12th.

10. How can MDH be more supportive of your program?

Lisa suggested that as a new Executive Director and a PA grantee she would appreciate one central location to access forms, policies, training information, and grant requirements.

11. Other?

Staffing and Clients are clearly separated from University LifeCare by the staff who are assigned to each client who visit their Center. Clients seen by any particular staff are counted toward that Center's numbers. Staff are also assigned to the same Center through their PA funding for the duration of the grant cycle.